



Filing ID #10025902

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Seth Moulton
Status: Member
State/District: MA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2018
Filing Date: 06/26/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: America Funds Roth IRA ⇒ American Funds 2045 Target Date Retirement Fund® Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ AMG Managers Fairpointe Mid Cap Fund Class I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ AMG Yacktman Focused Fund Class N [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ AQR Long-Short Equity Fund Class N [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ DBX ETF TR/X-TRACKERS MSCI EAF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Eaton Vance Global Macro Absolute Return Fund Class I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Fund Fidelity ® Government Money Market Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Eagle Fund IRA ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ iShares Corps MSP500 [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ iShares MSCI United Kingdom Index [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ ISHARES TR/EDGE MSCI USA QLTY [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Metropolitan West Total Return Bond Fund Class I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Oakmark International Fund Investor Class [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Oakmark Select Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Parnassus Core Equity Fund - Institutional Shares [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ SCHWAB STRATEGI/SCHWAB FUNDAMENTAL [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ T Rowe Price Institutional Floating Rate Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ TCW Emerging Markets Income [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Templeton Global Bond Fund Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Vanguard Growth ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Vanguard Health Care ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Vanguard Long-Term Bond ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Eagle Fund IRA ⇒ Vanguard Mid-Cap ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Vanguard Total Bond Market ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Wasatch Small Cap Growth Fund® Investor Class [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ AMG Yacktman Focused Fund Class N [MF]	SP	None	None		<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Fidelity® Government Money Market Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ iShares MSCI United Kingdom Index [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ iShares S&P 500 Index [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ MLPX MLP & Energy Infrastructure ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Oakmark International Fund Investor Class [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Oakmark Select Fund Investor Class [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Parnassus Core Equity Fund - Institutional Shares [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Transfer on Death Account ⇒ PRIMECAP Odyssey Growth Fund [MF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SCHWAB STRATEGI/SCHWAB FUNDAMENTAL [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Short Term National Municipal Bond Fund Common Stock [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SMI 50/40/10 Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SMLIX DWS Managed Municipal Bond Inst Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SPDR Nuveen Bloomberg Barclays [EF]	SP	None	None		<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ T Rowe Price Institutional Floating Rate Fund [EF]	SP	None	Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ T Rowe Price Tax-Free Income Fund; [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ TCW Emerging Markets Income Fund Class Institutional [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Vanguard Mid-Cap ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Wasatch Small Cap Growth Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Wells Fargo Fd Short-Term Municipal Bond Class A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ WELLS FARGO FUNDS TRUST HIGH YI [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Liz: Variable Life Insurace ⇒	SP	\$100,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
MainStay Growth Allocation Fund [WU]		\$250,000			
Niece's 529 Account ⇒ American Funds College 2033 Fund Class 529-A [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Seth: American Funds IRA ⇒ American Funds 2050 Target Date Retirement Fund® Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ AMG Managers Fairpointe Mid Cap Fund Class I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ AMG Yacktman Focused Fund Class N [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ AQR Long-Short Equity Fund Class N [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Eaton Vance Global Macro Absolute Return Fund Class I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Fidelity Government Money Market Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ iShares MSCI United Kingdom Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ iShares S&P 500 Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ ISHARES TR/EDGE MSCI USA QLTY [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Metropolitan West Total Return Bond Fund Class I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Oakmark International Fund Investor Class [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒		None	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Oakmark Select Fund; [MF]					
Seth: Eagle Strategies Roth IRA ⇒ Parnassus Core Equity Fund - Institutional Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ SCHWAB STRATEGI/SCHWAB FUNDAMENTAL [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Vanguard Growth ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Vanguard Health Care ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Vanguard Mid-Cap ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Wasatch Small Cap Growth Fund® Investor Class [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Xtrackers MSCI EAFE Hedged Equity ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Liz: Eagle Fund IRA ⇒ AMG Yacktman Focused Fund Class N [MF]	SP	06/22/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ AQR Long-Short Equity Fund Class N [MF]	SP	06/22/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ DBX ETF TR/X-TRACKERS MSCI EAF [EF]	SP	06/25/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ Eaton Vance Global Macro Absolute Return Fund Class I	SP	06/22/2018	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
[MF]					
Liz: Eagle Fund IRA ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]	SP	06/22/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ iShares Corps MSP500 [EF]	SP	06/25/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ iShares MSCI United Kingdom Index [EF]	SP	06/25/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ ISHARES TR/EDGE MSCI USA QLTY [EF]	SP	06/25/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ OANLX Oakmark Select Institutional Fund [MF]	SP	06/22/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ Parnassus Core Equity Fund - Institutional Shares [MF]	SP	06/22/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ SCHWAB STRATEGI/SCHWAB FUNDAMENTAL [EF]	SP	06/25/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ Templeton Global Bond Fund Class A [MF]	SP	06/22/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ Vanguard Health Care ETF [EF]	SP	06/25/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ Vanguard Long-Term Bond ETF [EF]	SP	06/25/2018	P	\$1,001 - \$15,000	
Liz: Eagle Fund IRA ⇒ Vanguard Mid-Cap ETF [EF]	SP	06/25/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF]	SP	06/25/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Eagle Fund IRA ⇒ Wasatch Small Cap Growth Fund® Investor Class [MF]	SP	06/22/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ AMG Yacktman Focused Fund Class N [MF]	SP	10/19/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Liz: Transfer on Death Account ⇒ AMG Yacktman Focused Fund Class N [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ GLB X FUNDS/MLP & ENERGY INFRAS [EF]	SP	10/22/2018	P	\$1,001 - \$15,000	
Liz: Transfer on Death Account ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]	SP	10/19/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]	SP	02/27/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]	SP	01/30/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ iShares MSCI United Kingdom Index [EF]	SP	10/22/2018	P	\$1,001 - \$15,000	
Liz: Transfer on Death Account ⇒ iShares S&P 500 Index [EF]	SP	10/22/2018	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Transfer on Death Account ⇒ iShares S&P 500 Index [EF]	SP	04/19/2018	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Transfer on Death Account ⇒ iShares S&P 500 Index [EF]	SP	02/28/2018	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Transfer on Death Account ⇒ ISHARES TR/SHORT-TERM NATL MUN [MF]	SP	10/22/2018	P	\$1,001 - \$15,000	
Liz: Transfer on Death Account ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class A [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Transfer on Death Account ⇒ Oakmark International Fund Investor Class [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Liz: Transfer on Death Account ⇒ Oakmark Select Fund Investor Class [MF]	SP	10/19/2018	P	\$1,001 - \$15,000	
Liz: Transfer on Death Account ⇒ Oakmark Select Fund Investor Class [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Parnassus Core Equity Fund - Institutional Shares [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ PRIMECAP Odyssey Growth Fund [MF]	SP	10/19/2018	P	\$1,001 - \$15,000	
Liz: Transfer on Death Account ⇒ ROWE PRICE TAX FREE INCOME FUND [MF]	SP	10/30/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SCHWAB STRATEGI/SCHWAB FUNDAMENTAL [EF]	SP	10/22/2018	P	\$1,001 - \$15,000	
Liz: Transfer on Death Account ⇒ SMI 50/40/10 Fund [MF]	SP	09/28/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SMI 50/40/10 Fund [MF]	SP	07/31/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SMI 50/40/10 Fund [MF]	SP	04/30/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SMI 50/40/10 Fund [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SMLIX DWS Managed Municipal Bond Inst Fund [MF]	SP	10/30/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SPDR Nuveen Bloomberg Barclays Short Term Municipal Bond [EF]	SP	10/22/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ SPDR Nuveen Bloomberg Barclays Short Term Municipal Bond [EF]	SP	04/19/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ T Rowe Price Institutional Floating Rate Fund [MF]	SP	10/19/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Liz: Transfer on Death Account ⇒ T Rowe Price Tax-Free Income Fund [MF]	SP	03/29/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ T. Rowe Price Institutional Floating Rate Fund [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ T. Rowe Price Tax-Free Income Fund Advisor Class [MF]	SP	08/29/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ T. Rowe Price Tax-Free Income Fund Advisor Class [MF]	SP	06/28/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ T. Rowe Price Tax-Free Income Fund Advisor Class [MF]	SP	04/30/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ T. Rowe Price Tax-Free Income Fund Advisor Class [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ TCW Emerging Markets Income Fund Class Institutional [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Vanguard Mid-Cap ETF [EF]	SP	10/22/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Vanguard Mid-Cap ETF [EF]	SP	04/19/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF]	SP	10/22/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF]	SP	04/19/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Wasatch Small Cap Growth Fund® Investor Class [MF]	SP	10/19/2018	P	\$1,001 - \$15,000	
Liz: Transfer on Death Account ⇒ Wells Fargo High Yield Municipal Bd Inst [EF]	SP	10/19/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒ Wells Fargo High Yield Municipal Bond [MF]	SP	04/18/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Transfer on Death Account ⇒	SP	04/18/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Short-Term Municipal Bond Fund; [MF]			(partial)		
Liz: Variable Life Insurance ⇒ MainStay Growth Allocation Fund [WU]	SP	Monthly	P	\$1,001 - \$15,000	
DESCRIPTION: Liz's insurance					
Seth: Eagle Strategies Roth IRA ⇒ Eaton Vance Global Macro Absolute Return Fund Class I [MF]		06/22/2018	P	\$1,001 - \$15,000	
Seth: Eagle Strategies Roth IRA ⇒ Invesco Oppenheimer Developing Markets Fund Class A [MF]		06/22/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ iShares MSCI United Kingdom Index [EF]		06/25/2018	P	\$1,001 - \$15,000	
Seth: Eagle Strategies Roth IRA ⇒ iShares S&P 500 Index [EF]		06/25/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ ISHARES TR/EDGE MSCI USA QLTY [EF]		06/25/2018	P	\$1,001 - \$15,000	
Seth: Eagle Strategies Roth IRA ⇒ MG Yacktman Focused Fund Class N [MF]		06/22/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ Oakmark Select Fund Investor Class [MF]		06/22/2018	P	\$1,001 - \$15,000	
Seth: Eagle Strategies Roth IRA ⇒ Oakmark Select Fund Investor Class [MF]		06/22/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Eagle Strategies Roth IRA ⇒ SCHWAB STRATEGI/SCHWAB FUNDAMENTAL [EF]		06/25/2018	P	\$1,001 - \$15,000	
Seth: Eagle Strategies Roth IRA ⇒ Vanguard Health Care ETF [EF]		06/25/2018	P	\$1,001 - \$15,000	
Seth: Eagle Strategies Roth IRA ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF]		06/25/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Korn Ferry Management Consulting	spouse salary	N/A
Spencer Stuart	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Beverly Bank	May 2017	Personal residence mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Millenium Train Project
Board Member	Salem YMCA

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none">Liz: America Funds Roth IRA (Owner: SP)Liz: Eagle Fund IRA (Owner: SP)Liz: Transfer on Death Account (Owner: SP) LOCATION: USLiz: Variable Life Insurace (Owner: SP)Niece's 529 Account LOCATION: MA
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- Seth: American Funds IRA
- Seth: Eagle Strategies Roth IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

COMMENTS

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Seth Moulton , 06/26/2019